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ABSTRACT

This paper reports on a program at the National Institutes of Health (NIH) Library that was instituted to train library technicians to work at the Information Desk as Reference Assistants; the objectives of the program were to train library technicians to become reference assistants, to free up librarians' time for new work assignments, and to increase the job satisfaction of library technicians. Following an introductory section, the second section of the paper lists several useful points from a review of the literature on training paraprofessionals for work at the information desk. The third section discusses recruitment of trainees. The fourth section presents an outline of the training plan, consisting of nine developmental objectives, each having one or more developmental activities and resources. The fifth section describes the assessment of the Reference Assistants, which included a written evaluation by a mentor, a written test, and observation at the reference desk. The sixth section summarizes lessons learned. (MES)

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Raising the Bar or Training Library Technicians to Assume Reference Responsibilities

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The National Institutes of Health (NIH) Library instituted a program to train library technicians to work at the Information Desk as Reference Assistants. The objectives of the program were to train library technicians to become reference assistants, to free up librarian's time for new work assignments, and to increase the job satisfaction of library technicians.

Prior to the training program, the Information Desk was staffed Monday through Friday from 8:30 a.m. to 5:00 p.m. by one librarian or, during the busiest times, by two librarians. The librarians were all members of the Information Services Team, who met monthly to coordinate the service, and were responsible for staffing the esk, performing mediated database searches, and responding to questions about accessing and using the Library's electronic resources. These services required about 90 hours a week of the librarian's time.

A number of factors, such as changes in document delivery procedures, had a direct effect on staffing needs in the Library. As users of the NIH Library increasingly were able to submit document requests electronically, as a result of a search of databases such as PubMed and Web of Science, the requests contained citations that did not need correcting. The highly skilled library technicians who had performed this work had less and less work to do. At the same time librarians, who had traditionally staffed the Information Desk, were increasingly asked to do new work including developing web pages, evaluating and negotiating licenses for electronic resources, and knowledge management projects. It was difficult for the librarians to find the time to perform both the traditional work and the new work. In addition, fewer reference questions and fewer mediated search requests were being received at the Information Desk. Finally, a survey of the types of questions received at the Desk revealed that approximately 60% were of the ready reference type question that could easily be answered by well-trained paraprofessionals.

As a result of these changes, it was decided to build upon the special skills of the library technicians in searching databases and verifying references and train them to use a broader array of print and electronic resources so that they could work at the Information Desk as Reference Assistants. The Assistants would be expected to respond to questions about the Library's collections and services; search the online catalog and respond to questions about the Library's holdings; verify citations using specific tools; perform cited reference searches; assist customers using the computers located in the Library; respond to ready reference questions using Library resources such as the reference collection, the

Internet and the Library's electronic resources; and guide and explain to customers the resources available on the Library's web site.

This change in staffing would ensure that the library technician's skills will be put to good use and about 30 hours a week of the librarian's time would be freed for new work. In addition, the library technician's jobs would become more varied, they would be able to develop new skills, and their jobs would, therefore, be more interesting.

BACKGROUND

A review of the library literature concerning training paraprofessionals for work at the information desk revealed a number of articles with good advice about setting up such a program. The following points were very useful to us as we developed our own training plan:

- Design and implementation of an effective training program considers details such as class time, supplementary materials, teaching and learning styles, and evaluation methods (1).
- Both knowledge based skills, which cover such things as the use of common library reference tools, and communication skills, which reinforce the appropriate positive attitudes such as body language, active listening, interview techniques and the ability to handle difficult questions need to be considered (8).
- One should provide a clear definition of the tasks that reference assistants will perform and the resources or services that they will be providing to the customers (8).
- One should provide accurate written documentation of the library's policies and procedures (8).
- Training should be customized to the needs of the individual library, the specific questions that are likely to come, and the readily available information sources that will serve to answer them (3, 6).
- Training should be customized for the trainee though the use of a training needs survey (3).
- Training can be provided by the use of both outside and in-house trainers including paraprofessional staff (9).
- Close proximity between reference assistants and professional librarians will provide hands-on-training and help to ensure quality service at the desk (5, 7).

RECRUITMENT AND TRAINING

Recruitment began in the summer of 2000 when a vacancy announcement describing the position and the skills needed for the job was posted on the Library's Intranet inviting all library technicians to apply for the Reference Assistant Training Program. Each candidate, if chosen, was expected to serve approximately 8 hours a week as a member of the Information Services Team with, eventually, five of the eight hours devoted to working at the Information Desk. By the closing date of the announcement, five library technicians, four from the Document Delivery Unit and one from the

Circulation Unit, had submitted applications for the program. The applications consisted of the following documents:

a. A statement of their interest in and qualifications for the position
b. A signed consent form from their supervisor verifying that they had the time to participate in the program
c. A response to the three skills needed for the position that they considered to be most relevant to the position.

All applications were submitted to and reviewed by a team composed of members of the Information Services Team. All five applicants were subsequently interviewed and accepted into the program. Each trainee was assigned a mentor, a professional reference librarian, who would work with them throughout the program.

OUTLINE OF PROGRAM

Before the training program started a training plan was developed that outlined the training activities made available to the reference assistants. We were aware that people have different learning styles and, therefore, to ensure a successful program we incorporated several types of learning activities including readings, lecture and discussion, practice reference questions, coursework, observation, independent study, working at the Information Desk, and mentoring.

The training plan consisted of nine Developmental Objectives (see Figure 1) with each objective having one or more Developmental Activities (see example in Figure 2) to help achieve the objective.

Figure 1: Developmental Objectives
1. Learn the organizational structure and research programs of NIH
2. Learn the policies and procedures of the NIH Library
3. Assist customers to locate Library materials.
4. Enhance the communication skills necessary to conduct a reference interview.
5. Provide accurately and timely answers to basic or ready reference questions with source identification.
6. Become familiar with electronic resources available on the Library's reading room computers.
7. Become familiar with the structure, function, and principles of frequently used electronic resources.
8. Become familiar with web browsers, web search engines, and useful biomedical and reference sites sufficient to perform topical and citation verification searches.
9. Become familiar with the principles and practices of online search strategy sufficient to perform topical, cited reference, citation verification, and cited reference searches.
10. Keep abreast of current and emerging information technology in the NIH Library.

Each Developmental Activity contains one or more resources. These resources consist of activities, classes (developed in house or given by vendors), self-directed learning, suggested readings, exercises, and formal training classes. Each resource was

designated as either mandatory or optional, was assigned a difficulty level, and was given an estimated time in which it could be completed.

Figure 2: Examples of the Developmental Activities and Resources

5.1 Developmental Activity: Become familiar with heavily used printed reference tools.

Resources:

5.1.1. Shelve books in the reference collection for two months. (Optional)
Time Commitment: 2.5 hours/week
Level of Difficulty: Basic
Instructor: Self Study

5.1.2. Attend review of highly used reference tools and answer practice questions. (Mandatory)
Time Commitment: 2 hours
Level of Difficulty: Basic
Instructor: Reference Staff

5.1.3. Locate answers to practice reference questions. Review with mentor. (Mandatory)
Time Commitment: 10 hours
Level of Difficulty: Intermediate
Instructor: Self-study and mentor

7.1 Developmental Activity: Become familiar with coverage and ways to access the Library's electronic resources.

Resources:

7.1.1. Attend overview of the Library's Web page including the electronic resources (Mandatory)
Time Commitment: 1 hour
Level of Difficulty: Basic
Instructor: Instruction Team

7.1.2. Attend in-house tutorial on searching Ovid (Mandatory)
Time Commitment: 1 hour
Level of Difficulty: Intermediate
Instructor: Instruction Team

7.1.3. Attend Seminars on searching Web of Science and PubMed (Mandatory)
Time Commitment: 2 hours
Level of Difficulty: Intermediate
Instructor: Instruction Team

7.1.4. Read handouts prepared by NIH Library staff members on using Web of Science, PubMed and Ovid. (Mandatory)
Time Commitment: 3 hours
Level of Difficulty: Advanced
Instructor: Self Study

It was estimated that the total time period needed to complete the Training Plan was six months. However, prior to the start of formal training, each reference assistant was given an assessment tool, designed to test his or her knowledge of some of the training plan objectives. The completed Assessment Tool was given to their mentor to score and the results were discussed the assistants. If the answers to one or more of the objectives showed that they were knowledgeable in that area, then they did not have to complete the related resources, e.g., document delivery technicians were knowledgeable in the areas of document delivery policies and procedures and some were also knowledgeable in using PubMed to verify and/or complete citations.

In addition to completing the objectives outlined on the Training Plan, each Reference Assistant began serving on the Information Desk, one hour a week with their mentor. The first month was spent mainly observing and learning the routine. During the second month they began answering questions, always under the guidance of their mentor, and during the third month they began serving two hours a week on the Information Desk. At the end of the six-month period, each Reference Assistant was serving five hours per week on the Information Desk without their mentor. However, another member of the reference staff was always assigned to the Desk and acted as their backup, should they need it.

ASSESSMENT

At the end of the training program, we assessed the Assistant's ability to perform reference work by asking their mentor to provide a written evaluation, requiring that the Assistants pass a written test, and observing them at the Information Desk. The mentor's written assessment was based on whether the Assistant had achieved the required developmental objectives. The mentor rated the Assistant's ability in each objective using a five-point scale and was asked to give their opinion about whether the Assistant had successfully completed the program. The written exam contained fifty multiple choice or true-false questions that primarily concerned the resources available in the Library and Library policies and procedures. Finally, the Assistants were observed during two different periods of working at the Information Desk and were rated on their ability to interact with customers using the "Model Reference Behaviors Checklist" found in the article by Gers and Seward (4).

LESSONS LEARNED

During the course of the training program, several issues needed to be addressed. The Assistant's were given eight hours a week to complete the training program; however, they found it difficult to fit in their regular duties along with the program. The Assistants had to learn to apply time management principles to ensure that the objectives of the program were achieved as well as the completion of their usual duties. This issue indirectly led to a change that was made in the program as it progressed. The training plan had originally called for the Assistants to spend a significant amount of time in self-paced study such as reading articles, working their way through *The Language of Medicine: A Write in Text Explaining Medical Terms* (2), perusing the more heavily used

reference books, or exploring some of the electronic resources available to customers. This self-paced study proved difficult to fit in to an already hectic schedule and we, therefore, modified the program to include more formal courses that were taught by Library staff. Courses that were added included classes on the most heavily used reference books, trouble shooting problems with the computers provided in the Library, cited reference searching, and introductions to many of the Library's electronic resources.

An added bonus to the program is that the librarians who worked with Assistants found that they learned a lot from the Assistants about the Assistant's areas of expertise, circulation and document delivery, and were, therefore, better able to explain the Library's policies and procedures in these areas to the customers.

To assure the continued success of the Reference Assistant Program, we are currently developing a 'continuing education' and on-going evaluation program for the Assistants.

CONCLUSION

The successful implementation of this education program resulted in the training of four library technicians to respond to ready reference questions at the Information Desk and provided more time for librarians to pursue new areas of responsibility.

The increase in job satisfaction by the library technicians is illustrated by this quote from one of the Assistants, "I love being a reference assistant. I find the work both stimulating and educational. I know that the experience I am gaining at the information desk will be invaluable to me in whatever future career path I take. I also enjoy the closer professional relationships I have developed with the librarians."

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